



# Supervising Court Investigator

Class Code:  
4979

Bargaining Unit: Alameda County Management Employees Association

SUPERIOR COURT OF CALIFORNIA, COUNTY OF ALAMEDA  
Established Date: May 12, 2015  
Revision Date: May 12, 2015

## SALARY RANGE

SEE SALARY SCHEDULE

## JOB DESCRIPTION:

### JOB DEFINITION

Under direction, plan, organize, coordinate, assign, supervise and evaluate the work of Court Investigators who conduct investigations of individuals who are the subject of petitions of conservatorship or guardianship in the Probate Court as well as other support staff; assist in the development of and implementation of policies and procedures specific to the unit; train and develop staff within the unit; and perform other related duties as assigned.

### DISTINGUISHING FEATURES

This classification is the supervising level in the Court Investigator Office and reports to the Civil Division Director. This classification is responsible for monitoring and prioritizing daily workflow, and for mentoring, training and providing technical guidance to Court Investigators. While maintaining a reduced caseload this position acts as a liaison with the Civil Division Director, makes recommendations regarding policies, practices, and procedures, and exercises direct supervision over Court Investigators.

## EXAMPLES OF DUTIES:

NOTE: The following are duties performed by employees in this classification; however, employees may perform other related duties at an equivalent level. Each individual in the classification does not necessarily perform all listed duties.

1. Determines which petitions require investigations; prioritizes and assigns work; monitors work progress and timelines; conducts regular quality control reviews to assess field investigations reports and that time lines are met; creates processes and procedures to evaluate work flow; reviews and approves investigations and reports prepared by the Court Investigators to ensure compliance with the law, office and court policies; develops policies and procedures in response to changes in the law and judicial requests; serves as liaison to the probate judges; develops,

updates and revises forms and materials used by the Court Investigator's Office and the court.

2. Participates in employee selection, creates training plans for staff and ensures adequate and timely training of staff; consults with professional staff on difficult and high profile cases; establishes performance standards; evaluates employees' job performance and work behavior; provides feedback on formal and informal basis, increases staff competency and learning; investigates and recommends disciplinary action; and approves leave time and time sheets.

3. Develops and implements programs to expand services offered by the court investigator's office; serves as liaison between the Court Investigator's Office and the community.

4. Conducts investigations and interviews in conservatorship and guardianship matters; advises persons of legal rights, makes determinations and provides written recommendations to the Court as appropriate in conservatorship and guardianship proceedings; makes collateral contracts as appropriate an investigation; assesses living conditions, reviews medical records, petitions, reports and fiduciary accountings; attends hearings; briefs judicial officer about particular cases; and follows up on judicial orders.

5. Conducts special investigations requested by the Court; handles complaints, calendars special hearings as necessary; mediates disputes between contesting conservators in special cases as requested by the Court.

6. Reviews and approves requests for waiver and/or deferment of Court Investigator fees. Maintains files for Private Professional Conservators; processes applications, including background check; updates listing; and ensures compliance with requirements.

7. Serves on committees and/or task forces within the Court and with local and state agencies and organizations; attends a variety of meetings, training or other Court-related business.

8. Performs other related duties as assigned.

## **MINIMUM QUALIFICATIONS:**

(May meet one of two options.)

### Option I

#### Experience:

The equivalent to two years of full-time experience as a Court Investigator in the Superior Court of California, County of Alameda classified service. One year of experience as a supervisor is highly desirable.

### Or Option II

Education:

Possession of a Bachelor's degree from an accredited college or university in the social sciences, behavioral sciences, psychology, administration of justice or a related field.

And

Experience:

The equivalent to four years of full-time professional level experience performing case or investigative analysis in a legal, judicial, social services or medical environment that included at least two years of supervisory experience.

Proven ability to plan, assign, supervise, review and evaluate the work of professional staff.

## **KNOWLEDGE AND ABILITIES:**

*Knowledge of* California Probate Code, other California codes pertaining to probate, conservatorship and guardianship matters; court procedures; legal and medical terminology and documents; principles and practices of employee supervision, training and staff development; investigation methods, including interview techniques; customer service and conflict resolution methods and techniques; problems of the elderly, the developmentally disabled and brain damaged; children's needs and special interests; cultural diversity issues; basic accounting and auditing procedures applicable to probate cases; correct English usage, punctuation and grammar.

*Ability to* understand, interpret and apply pertinent provisions of the Probate Code, Civil Code, and other California Codes, Judicial Council and Superior Court rules and procedures; interview a variety of individuals, including the elderly, developmentally disabled, children, and others in homes, hospitals, institutions, and other locations; use communication, listening and problem solving skills to assist culturally diverse parties in finding solutions; obtain, interpret and evaluate information from various sources, analyze problems and documents and make appropriate recommendations; use initiative and exercise sound judgment; understand and analyze complex issues; communicate effectively, both orally and in writing, with judicial officers, attorneys, staff and members of the public; write comprehensive, factually accurate reports, informational materials and procedures; effectively represent the Court in answering questions, responding to inquiries, providing assistance and dealing with concerns from the public, community organizations, other Court staff and government agencies; and operate modern office equipment, including telephone, computer, printer, copier and fax machine.